

CSBG/NPI Programs Workplan and Report Instructions

Purpose

The CSBG/NPI Programs Report (CSD 801) is used as a Community Action Plan (CAP) workplan, contract workplan and progress reporting form. This form is used to establish performance expectations and goals over the contract term. The Progress Report will capture the agency's success in achieving the goals. The goals and National Performance Indicators (NPI) used in the CSD 801 form are National Goals and Indicators, which CSD is required to annually track and report the outcomes to the U.S. Health and Human Services Agency (HHS), Office of Community Services (OCS), and the National Association of Community Service Programs (NASCSP).

There are six (OCS) Goals and under each goal is a list of indicators that pertain to that goal. The listed indicators were created and taken from the OCS Guide to Organizing and Reporting National Indicators of Community Action Performance, which was created in collaboration within the Community Services Network.

Format of Document

This format is created in an Excel template and designed to be completed and submitted electronically. The CSD 801 is one (1) workbook, broken down into 9 worksheets. At the bottom of the Excel screen are tabs labeled for each goal (1-6), as well as instructions and an explanations section.

- The initial tab, "NPI Guide", contains the NASCSP Instructional Manual. Please read the guide in order to understand what should be reported on the OCS Goals. This manual is useful when completing the NPIs.
- The second tab, "Instructions" contains these instructions as a reference.
- The subsequent tabs are labeled Goals 1 through 6 Workplan and Goals 1 through 6 Reporting.

The entire workbook must be submitted electronically by the due date to CSBGReports@csd.ca.gov. In the subject line, please indicate the agency name the report is being submitted for and contract number. (Example: CAP CSD, 11F-XXXX.)

Completing the NPI Workplan (CAP and Contract Workplan)

- At the beginning of the "Goal 1 Workplan" tab provide your contract number, report period, contractor's name, contact person and title, phone number, fax number and e-mail address. This information will only need to be provided once. The data will automatically populate into all other tabs from the "Goal 1" tab.
- Put an X in the upper right hand box, indicating CAP, Workplan, and the for the Workplan and. Indicate the contract number is next to the Contract Workplan Number.
- **Problem Statement:** In this section you should clearly and

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thoroughly describe the problems facing low-income individuals in your community as is relates to achieving each goal. This information should be detailed and include who is effected, what specifically is the problem, where the problem exists and why it exists.

- **Program Activities and Delivery Strategies:** In this section, provide a detailed description of the programs or activities undertaken in order to alleviate the barriers to self-sufficiency identified in the problem statement.
- **Number of Participants/Units Expected to Achieve Outcome in Reporting Period:** This column will be filled out on the Workplan for Goals 1 through 6. Provide the number of participants/units Expected to Achieve for the mid-year and annual reporting period for each indicator. The Workplan numbers will be automatically populated into the Reporting tabs for Goals 1 through 6.
- ALL DATA FIGURES should be NUMERICAL. If the indicator does not apply to your agency's work, or data pertaining to that question is not available, leave the cell blank. Do not use percentages, fractions, abbreviations or alpha text.

Sample NPI Workplan

Goal 1: Low-income people become more self-sufficient.

NPI 1.1: Employment

Problem Statement: (If additional space is needed, please attach a separate sheet.)

Young women and men in Sacramento County have a difficult time finding gainful employment due to a lack of skills and education. When employed, this population commonly is employed in minimum wage jobs that do not provide health benefits.

Program Activities and Delivery Strategies: (If additional space is needed, please attach a separate sheet.)

The Youth into Jobs program will provide job search and resume assistance in the Young People to Work Program. This program will track individuals in the program to ensure they are in employment that will be maintained and increase their wages.

National Performance <u>Indicator 1.1</u>		Reporting Period	WORKPLAN
Employment			Number of Participants Expected to Achieve Outcome in Reporting Period (#)
The number and percentage of low-income participants in Community Action employment initiatives who get a job or become self-employed, as measured by one or more of the following:			
A.	Unemployed and obtained a job	Mid-Year	5
		Annual	10
B.	Employed and maintained a job for a least 90 days	Mid-Year	
		Annual	
C.	Employed and obtained an increase in employment income and/or benefits	Mid-Year	20
		Annual	40
D.	Achieved "living wage" employment and/or benefits	Mid-Year	
		Annual	
In the rows below, please include any additional indicators for NPI 1.1 that were not captured above.			
		Mid-Year	
		Annual	

Completing the NPI Reporting – Mid-Year

- Put an X in the upper right hand box indicating, Mid-Year Progress Report. The Mid Year Progress Report covers the term of January through June. Each Report will reflect the agency's success in achieving the outcomes. Also,

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- indicate the contract number is next to the Contract Workplan Number.
- For the Mid-Year Progress Report, covering January through June, only report data on the grey sections.
 - **Number of Participants/Units Expected to Achieve Outcome in Reporting Period:** The Workplan numbers will be automatically populated into the Reporting Document for Goals 1 through 6.
 - **Number of Participants/Units Enrolled in Program(s) in Reporting Period:** Enter actual number enrolled in program (s) for the reporting period.
 - **Number of Participants/Units Achieving Outcome in Reporting Period:** Enter the number that achieved the outcome for the reporting period.
 - **Percentage Achieving Outcome in Reporting Period:** This field requires no data entry and will be automatically calculated from previous columns.
 - **Required Explanation:** This field requires no data entry and will be automatically calculated from previous columns. If a response is required, provide the explanation for the variance on the last tab, "Required Explanations". The acceptable range for achievement for each reporting period is 80% to 120% of what the agency expected to achieve.
 - ALL DATA FIGURES should be NUMERICAL. If the indicator does not apply to your agency's work, or data pertaining to that question is not available, leave the cell blank. Do not use percentages, fractions, abbreviations or alpha text.

Sample NPI Reporting – Mid-Year

Goal 1: Low-income people become more self-sufficient.						
National Performance Indicator 1.1	Reporting Period	1 Number of Participants Expected to Achieve Outcome in Reporting Period (#)	2 Number of Participants Enrolled in Program(s) in Reporting Period (#)	3 Number of Participants Achieving Outcome in Reporting Period (#)	4 Percentage Achieving Outcome in Reporting Period (3/1=4) (%)	5 Explanations Required (Report on last tab)
Employment The number and percentage of low-income participants in Community Action employment initiatives who get a job or become self-employed, as measured by one or more of the following:						
A. Unemployed and obtained a job	Mid-Year	5	2	3	60%	Explanation
	Annual					
B. Employed and maintained a job for at least 90 days	Mid-Year					
	Annual					
C. Employed and obtained an increase in employment income and/or benefits	Mid-Year	20	15	12	60%	Explanation
	Annual					
D. Achieved "living wage" employment and/or benefits	Mid-Year					
	Annual					
In the rows below, please include any additional indicators for NPI 1.1 that were not captured above.						
	Mid-Year					
	Annual					

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Completing the NPI Reporting – Annual

- Put an X in the upper right hand box indicating, Annual Report. The Annual Report covers the term of January through December. Each Report will reflect the agency's success in achieving the outcomes. Also, indicate the contract number is next to the Contract Workplan Number.
- For the Annual Report, covering January through December, report data on the blue sections. Do not delete the data that was reported for the Mid-Year Progress Report.
- **Number of Participants/Units Expected to Achieve Outcome in Reporting Period:** The Workplan numbers will be automatically populated into the Reporting Document for Goals 1 through 6.
- **Number of Participants/Units Enrolled in Program(s) in Reporting Period:** Enter actual number enrolled in program (s) for the reporting period.
- **Number of Participants/Units Achieving Outcome in Reporting Period:** Enter the number that achieved the outcome for the reporting period.
- **Percentage Achieving Outcome in Reporting Period:** This field requires no data entry and will be automatically calculated from previous columns.
- **Required Explanation:** This field requires no data entry and will be automatically calculated from previous columns. If a response is required, provide the explanation for the variance on the last tab, "Required Explanations". The acceptable range for achievement for each reporting period is 80% to 120% of what the agency expected to achieve.
- ALL DATA FIGURES should be NUMERICAL. If the indicator does not apply to your agency's work, or data pertaining to that question is not available, leave the cell blank. Do not use percentages, fractions, abbreviations or alpha text.

Sample NPI Reporting – Annual

Goal 1: Low-income people become more self-sufficient								
National Performance Indicator 1.1			1	2	3	4	5	
Employment		Reporting Period	Number of Participants Expected to Achieve Outcome in Reporting Period (#)	Number of Participants Enrolled in Program(s) in Reporting Period (#)	Number of Participants Achieving Outcome in Reporting Period (#)	Percentage Achieving Outcome in Reporting Period (3/1=4) (%)	Explanations Required (Report on last tab)	
The number and percentage of low-income participants in Community Action employment initiatives who get a job or become self-employed, as measured by one or more of the following:		A. Unemployed and obtained a job	Mid-Year	5	2	3	60%	Explanation
			Annual	10	10	8	80%	
B. Employed and maintained a job for a least 90 days			Mid-Year					
			Annual					
C. Employed and obtained an increase in employment income and/or benefits			Mid-Year	20	15	12	60%	Explanation
			Annual	40	35	35	88%	
D. Achieved "living wage" employment and/or benefits			Mid-Year					
			Annual					
In the rows below, please include any additional indicators for NPI 1.1 that were not captured above.								
		Mid-Year						
		Annual						